AMENDMENTS

In the Specification

SUMMARY OF THE INVENTION

[0001] A method and system for defining and generating forecasts is provided. In one embodiment, the forecast system receives a forecast definition from a user, generates a forecast in accordance with the forecast definition, stores a forecast snapshot of the generated forecast, and presents to users forecast information derived from the forecast snapshots. A forecast definition specifies the participants to be included in a forecast and when to generate the forecast. When defining a forecast, the forecast system receives from a user a scheduled time that includes a forecast interval, a day within the forecast interval for creating forecasts, and the roles of the participants to be included in the forecasts. At the scheduled time, the forecast system automatically generates a forecast and stores a forecast snapshot. The forecast snapshot includes forecast information for each participant along with the underlying opportunity information used to generate the forecast. The forecast information of a forecast snapshot includes summary forecasts for each manager within the hierarchy of the participants and individual forecasts for each participant. (A manager is a participant who has one or more reporting participants.) The forecast system thus allows forecast definitions to be specified by users who do not have extensive training and experience with forecasting systems, and it allows forecasts to be automatically generated. The forecast system may also automatically notify each participant (e.g., via electronic mail or other alert mechanism) that a forecast will be generated or has been generated so they can update their opportunity or forecast information.

In one embodiment, the forecast system presents forecast information in a way that allows a requesting user to easily view summary information, individual information for each participant, and the opportunity information of the requesting user. In this embodiment, the forecast system receives a request from a user to display forecast information for a forecast period (e.g., the current quarter). The forecast system then retrieves summary forecasts for the requesting user and individual forecasts for the participants that were previously saved in the forecast snapshots for that period. The forecast system then retrieves the current opportunities of the requesting user. The forecast system generates a display description (e.g., a web page) with a summary area, a participants area, and a user area. The summary area includes summary

information for the forecasts of the requesting user. For example, the summary area may include a total revenue amount for all participants who report to the requesting user. The participants area includes information relating to the retrieved individual forecasts of each participant. The summary and participants areas may include a breakdown of the information based on the date of the forecast snapshots. The user area includes information relating to the current opportunities of the requesting user. The display description is then provided for display to the requesting user. The requesting user can then request to view the supporting information. For example, when the requesting user selects an individual forecast of the participants area, the forecast system may retrieve from the forecast snapshot the opportunity information used to generate the individual forecast and display it to the requesting user. The forecast system may allow the requesting user to drill down through the forecast information to the underlying opportunity information. The forecast system may allow the requesting user to edit their forecast information and may maintain an audit trail of the edits.